

Offutt Tax Assistance Office

To receive tax assistance you must be Active Duty (E6 and below, O2 and below), Deployers, Surviving Spouses, Retired 65 and older, or their dependent. Reservists and National Guard members (in above ranks/age) and their dependents only qualify when on Title 10/32 orders or retired and have a BLUE ID card. IDs valid for medical insurance only are not eligible. **No rentals, businesses or Sch K-1 Forms 1065 or 1120S.** A separate appointment must be made if your dependent needs a tax return and they must be present.

Bring the following documents/information

- **Military ID.** If filing joint, both spouses must be present prior to starting the tax return and both must have a photo ID. If one taxpayer needs to leave they can return later to sign (Will not e-file until both sign).
- **Power of Attorney** will be accepted for deployed spouse.
- **Social Security cards/copy** for you, spouse and dependents (IRS Requirement) and their **birthday info.**
- **Copy of last year's federal tax return.** You **MUST** have your 2015 return!
- **Bank information** with routing & account number (voided check preferred, NO deposit slips).
- **You will need the following forms/documents:** (cannot complete tax return without these forms).
 - **Affordable Care Act Form 1095:** These forms prove you and your dependents have medical insurance. This form is provided by your employer (1095-C), or an insurance company in the marketplace (1095-A), or an insurance company outside the marketplace (1095-B).
 - **Income Forms:** All **W2s/W2Gs** from employers and casinos; all **1099s** (i.e. Banks, Brokers, Retirements, 529s, real estate sales); December LES and bank statements with year to date interest amounts reported; **Cost basis** for stock/mutual fund shares sold.
 - **Adjustment Forms:** All **1098s** (i.e. Student loans, College Tuition, Mortgages); all **5498s** (contributions to HSAs, Traditional or Roth IRAs for 2016).
 - **Sch A: Medical expenses paid** (co-pays for Eye glasses, dental, or doctor visits); **Taxes paid** (state income, real estate, property tax on vehicles {pink slip/registration slip}); **Interest you paid** (Mortgage, HUD-1 statement if you purchased/refinanced the home in 2016); **Gifts to charities** (receipts are required!) For cash, debit or check donations you will need letters from all organizations; for non-cash donations to Goodwill, Salvation Army etc., receipts are required - (**if more than \$500 in donation value, provide date item was purchased, cost at time of purchase, and source used to obtain donation value**)
- **Other Receipts/Documents**
 - Child care expenses: Must include name, address & tax ID of provider.
 - Alimony: If you received it, provide amount. If you paid it, provide amount and SSN of ex-spouse.
 - Paid receipts that cover college tuition, books, lab fees, etc.
 - Signed Form 8332 from custodial parent if claiming a dependent that does not live with you. A divorce decree can be substituted for this form if divorced prior to 2009.
- **Any other documentation** for income or deductions not mentioned above.

Tax documents need to be kept for a minimum of three years. You should keep your actual tax returns indefinitely. In most cases, you can shred the supporting documents three years after the tax-filing deadline, which is how long the IRS usually has to initiate an audit. Be sure to keep records showing the purchase date and price of stocks and mutual funds in taxable accounts until three years after you sell the investments. Maintain your HUD-1 paperwork for purchasing and refinancing your home, you should keep these for at least 7 years after you sell that home. It is extremely important to keep form 8606, on which you report non-deductible contributions to a traditional IRA, until you have withdrawn all of the money.